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Foreign Crops and MARKETS



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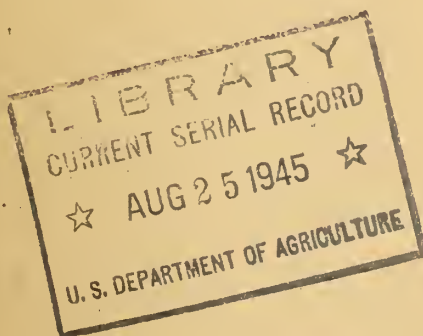
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L A T E C A B L E S

The 1946 Cuban sugar crop is currently forecast at 4,250,000 short tons. This forecast is based on an analysis of acreage available for harvest in 1946 and the assumption that rainfall during the remainder of the growing season will approximate normal. It compares with the output in 1945 of 3,925,000 short tons, and the "one and one-half" crop in 1944 of 5,650,000 short tons (including the equivalent of 900,000 short tons produced in the form of invert molasses). Heavy plantings of cane were made last fall and this spring, but the severe drought extending from November to May retarded development of the crop. It is probable that the acreage for harvest in 1946 will be about 200,000 acres larger than in 1945, but yields per acre probably will not be much greater than in 1945, or around 14 tons per acre. The relatively low per-acre yield is due more to the absence of 2-year growth cane than to the deficiency of rainfall.

Brazil's exportable surplus of rice, based on the 1945 harvest, is estimated at 220 million pounds available from August 1945 through February 1946.

The 1945 Ecuadoran rice harvest of May-August is revised upward to 3,800,000 bushels (110 million pounds milled), and the October-December outturn is forecast between 870,000 and 1,390,000 bushels (25-40 million pounds) in a cable from Quito. The Ecuadoran Government is expected to authorize for export from 35 to 45 million pounds on commitment to Cuba and 4 million to Costa Rica from the present harvest. *From 10 to 20 million pounds may be obtained for export from the second crop.

The Peruvian rice output for 1945 is estimated at 6,240,000 bushels (185 million pounds milled), in comparison with 6,900,000 bushels (200 million pounds) harvested in 1944.

Danish crop acreages in 1945 are expected to show no significant changes from those for 1944 when the total areas cultivated were as follows: All grains, 3,266,662 acres; potatoes, 242,158 acres; sugar beets, 103,782 acres; roots for feed, 985,929 acres; natural and cultivated meadows for hay, 874,734 acres; and grass and green feed, 2,003,981 acres. As of July 15, crop conditions are generally favorable.

An Argentine decree of August 7 prohibits the exportation, except under permit, of tankage, bones, packing house byproducts, and vegetable refuse which might be used as fertilizer or raw material for the manufacture of fertilizer. The measure was adopted to facilitate the domestic utilization of fertilizer produced in the country.

Finnish crop prospects as of July 15 were reported as follows: Rye - below average, but slightly better than expected in June; barley and oats - less favorable than in June; potatoes - average; turnips and other root crops - average; hay, timothy, and meadow grass - slightly under average; and pastures - average.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS**REDUCED MEXICAN CORN CROP
INSUFFICIENT TO MEET NEEDS**

On the basis of the present outlook, the 1945 corn crop in Mexico, which is expected to be smaller than last year as well as less than average for recent years, will not be sufficient to meet 1946 requirements. Import needs for the country's minimum requirements are placed at from 6 to 16 million bushels (150-400,000 metric tons). Present prospects indicate low yields, with a reduction of possibly as much as 25 percent compared with the 1944 harvest of 96 million bushels.

Planting for the main corn crop usually extends through July. Continued dry weather this season delayed planting and made replanting necessary in many areas. In mid-July, it was recognized that the Government's goal of 10,556,000 acres could not be achieved. It was still considered possible, however, that the acreage might approach the 1944 corn area of 8,658,000 acres, assuming favorable weather for the remainder of the season.

**CANADIAN GRAIN PROSPECTS
IMPROVED**

Canadian grain prospects improved during the first week of August, with light to heavy rains received in the Prairie Provinces, except in southwestern Alberta. In Manitoba and eastern Saskatchewan, the crop outlook was very favorable. Prospects were improved somewhat in southwest Saskatchewan and central Alberta, though smaller than average yields were indicated. The crop outlook was considered critical in southeastern Alberta. In southwestern Alberta, however, an excellent crop might be expected if good rains are received. Average crops were expected in the Peace River area. The hay crop in Quebec and the Maritime Province was reported to be above average, as were the winter wheat yields in Ontario.

**INDIA REPORTS LARGE
WHEAT CROP**

India's 1945 wheat production was estimated at 392,037,000 bushels, according to the first official estimate released recently. At that figure the crop would be one of the largest on record, and compares with the 1944 production (August estimate) of 361,757,000 bushels. The first estimate of the 1944 crop has been revised from 386,624,000 to 385,466,000 bushels, while the third estimate of the 1944 acreage was revised to 33,630,000 acres from the previous estimate of 36,610,000 acres.

INDIA: Wheat acreage, yield per acre, and production,
1934-1945

Year of harvest	Acreage	Average yield	Production
	per acre		
	<u>1,000 acres</u>	<u>Bushels</u>	<u>1,000 bushels</u>
Average -			
1934-1938	34,612	10.6	366,233
1939-1943	34,551	11.2	386,967
Annual -			
1944	33,740	10.7	361,757
1945	a/ 35,072	11.2	b/ 392,037
From official sources.	a/ Third estimate.	b/ First estimate.	

The relatively good harvest would seem to be largely the result of the expanded acreage, with around average yields. The first estimate of production is usually released in April with successive estimates in May and August. In view of the lateness of the release this season and the scarcity of available information regarding other food crops, it is not yet possible to evaluate fully the effects of the crop outturn upon import requirements during the season.

RICE IN CENTRAL AMERICA
LESS THAN REQUIREMENTS

Due to the decline in domestic production as well as the difficulty of obtaining imports, the rice now available for consumption in Central America is insufficient to meet requirements, and acute shortages are expected in some countries before the bulk of the new crop is marketed beginning in November. Even though the 1944 rice acreage was increased in most areas, dry weather during the season greatly decreased the Central American output for consumption primarily in 1945. In some countries from which rice has been obtained for importation during the war, drought also curtailed production.

Panama and Costa Rica, the principal rice-importing areas in Central America, are faced with critical shortages, and very short supplies are reported in Guatemala and Honduras, countries which usually grow approximately enough rice to meet their own needs. British Honduras obtained about 1.4 million pounds of rice from the United States this year to help meet requirements. In El Salvador and Nicaragua, where exports usually vary between 5 and 10 million pounds, rice supplies also are now inadequate. As a result of a shortage of essential foodstuffs in El Salvador, a decree on July 5 provided for Government seizure of several food items, including rice, unless the commodities were released from storage within 6 days.

Prospects are favorable so far for good 1945-46 rice crops in most of the Central American countries. The acreage increased in many areas,

and the crops have been benefited by plentiful rainfall. The outlook in Panama is for a record crop. The Costa Rican Ministry of Agriculture estimates that its production probably will double the unusually small outturn of last year. In Nicaragua, almost perfect agricultural weather following the rainy season favored the increased sowings, although grasshoppers have caused some local damage. The late dry season in Guatemala, however, restricted production again this year.

CENTRAL AMERICA: Rice production, trade, and apparent utilization, averages 1931-1939, annual 1942-1944

Year	Production a/		Imports	Exports	Apparent utilization
	Rough	Milled			
	1,000 bushels	Million pounds	Million pounds	Million pounds	Million pounds
Average-					
1931-1935	5,037	147	30	1	176
1936-1939	5,884	172	21	3	190
Annual -					
1942	7,157	209	13	7	215
1943	9,300	272	15	17	270
1944c/.....	7,400	220	-	-	-

Compiled from consular reports and trade sources.

a/ Crop preceding calendar year of trade and utilization.

b/ Preliminary.

c/ Carry-over apparently was above normal.

FRUITS, VEGETABLES, AND NUTS

CANADIAN TREE FRUIT PRODUCTION
SMALLER THAN AVERAGE

The estimated production of Canadian tree fruits, except apples, has increased during the last month, due almost entirely to the excellent outlook for these fruits in British Columbia, where, with the exception of apples, all tree fruit estimates now indicate the largest production ever recorded in that Province. On the other hand, prospects for these fruits in eastern Canada continue poor. Total apple production is now estimated at 7,716,000 bushels, or a little less than half the crop of 17,829,000 bushels in 1944, with most of this reduction occurring in eastern Canada where apple scab has become very serious, and many apples are small and misshapen as a result of frost damage. The cherry crop in Ontario was damaged badly by rains in the middle of July, practically ruining it for the fresh market, but a portion of it was salvaged for processing.

Effective August 1, 1945, apricots, peaches, pears, and plums, including prunes, may no longer enter Canada under a general permit, but must be imported under a specific permit obtained for each shipment from the Wartime Food Corporation, Ltd., at Toronto. Import permits are being required in order that there may be no interference with the successful

marketing of the large British Colombia crop this year. This is the first time import permits for fruits have been required, and it is apparent that this system is being substituted for dumping duties as a protective measure. The Canadian Government has not applied dumping duties to fruit and vegetable imports during the past 3 years.

TREE FRUITS: Production in Canada,
1942-1945

Fruit	:	1942	:	1943	:	1944	:	1945
	:		:		:		:	
	:	1,000	:	1,000	:	1,000	:	1,000
	:	<u>bushels</u>	:	<u>bushels</u>	:	<u>bushels</u>	:	<u>bushels</u>
	:		:		:		:	
Apples	:	12,982	:	12,892	:	17,829	:	7,716
Pears.....	:	753	:	637	:	894	:	588
Plums and Prunes	:	377	:	363	:	534	:	420
Peaches	:	2,003	:	633	:	1,698	:	1,478
Cherries	:	364	:	217	:	285	:	183
Apricots	:	98	:	25	:	146	:	152
	:		:		:		:	

Compiled from official sources.

CUBAN PINEAPPLE PRODUCTION
EXPECTED TO SHOW INCREASE

Based on present indications, the 1946 crop of pineapples in Cuba is expected to be slightly larger than this year's crop of 2,483,000 crates, while the 1947 crop may be considerably greater than the 1946 output, due to new plantings in Pinar del Rio and Camaguey Provinces. Earlier estimates had placed the current crop at 10 percent more than the 1944 crop, but prolonged drought reduced both the crop and the size of the fruit. Production for fresh shipment is now estimated at about 920,000 crates. Most of the late crop will be ready for shipment in October when demand in the United States probably will be good.

Canned pineapple, consisting mostly of crushed pineapple and topping, packed in No. 10 cans, is estimated at 300,000 cases in 1945. Relatively high prices of fresh pineapple in the United States and the low ceiling price of canned pineapple limited the pack.

Production of pineapples in brine is estimated at 11,650 barrels of 300 pounds net, in 1945, an increase of 52 percent over the 1944 production and 43 percent more than the average during 1940-1943. This increase was due to the fact that exporters preferred to pack in brine, rather than take the risk of paying export costs and finding no demand at New York for small sizes of fresh pineapples.

Frozen pineapple was exported for the first time in 1945. About 2-1/2 million pounds is expected to be shipped.

PINEAPPLES: Estimated production in Cuba,
1940-1945

Year	For export a/				Domestic	Total
	Fresh	Canned	Brined	Frozen	Con- sumption	Pro- duction
	1,000	1,000	1,000	1,000	1,000	1,000
	crates	crates	crates	crates	crates	crates
1940	1,026	761	135	0	455	2,377
1941	979	860	136	0	481	2,456
1942	439	1,329	216	0	456	2,440
1943	630	1,832	102	0	622	3,186
1944	794	1,064	138	0	486	2,482
1945 b/	920	750	210	119	484	2,483

Compiled from official sources.

a/ Converted to fresh as follows: Fresh at rate of 80 pounds to a crate; canned, 41 pounds to a case and 2-1/2 crates of fresh per case of canned; 18 crates required to make a barrel of 300 pounds of pineapple in brine; and 21 pounds of frozen pineapple per crate.

b/ Estimated.

INDIAN CASHEW CROP

LARGER THAN LAST YEAR 1/

The preliminary forecast of Indian cashew production in 1945 is 47,000 short tons, shelled basis, compared with 33,600 tons in 1944 and 37,800 tons in 1943. The forecast is 3 percent smaller than the 5-year (1939-1943) average of 48,400 tons and only 1 percent larger than the 10-year (1934-1943) average of 46,400 tons. Production of cashew nuts grown in India has gradually increased during the past 20 years.

Growing conditions during the year have been generally satisfactory. A few areas report a slight damage by excessively hot days, but in the aggregate, damage has been insignificant.

Leading exporters estimate that of the total probable production about 9,000 tons of shelled nuts of suitable grade and quality will be available for export to the United States and other destinations. The lifting of the ban on imports of unshelled nuts from Africa may increase the available supply, provided sufficient transportation and packing material can be found. The unprecedented high cost of unshelled nuts on all Indian markets may be a limiting factor. The high United States prices are given as the reason for the increase.

1/ A more extensive statement on this subject is available upon request to the Division of Foreign Information and Statistics, Office of Foreign Agricultural Relations.

Export prices at the end of June at Madras were as follows:

		C. & F. U.S. port U.S. cents per pound
Wholes (various counts)	from	58 to 84
Scorched wholes	"	55 " 77
Butts	"	67 : 70
Splits	"	65 " 66
Pieces	"	47 " 52

COTTON AND OTHER FIBERS

WEEKLY COTTON PRICES ON FOREIGN MARKETS

The following table shows certain cotton price quotations on foreign markets, converted at current rates of exchange.

COTTON: Price of certain foreign growths
and qualities in specified markets

Market location, kind and quality	Date: 1945	Unit of weight	Unit of currency	Price in: foreign currency	Equivalent U.S. cents per pound
Alexandria (spot)		Kantar			
Ashmouni, F.G.F.	7-26	99.05 lbs.	Tallaris	35.50	29.65
Giza 7, F.G.F.	7-26	99.05 lbs.	Tallaris	40.25	33.61
Karnak, F.G.F.	7-26	99.05 lbs.	Tallaris	39.00	32.57
Bombay (Sept '45 futures)		Candy			
Jarila	7-27	784 lbs.	Rupee	429.25	16.49
Bombay (spot)		Candy			
Kampala, East African	7-27	784 lbs.	Rupee	850.00	32.66
Buenos Aires (spot)		Metric ton			
Type B	7-28	2204.6 lbs.	Peso	1300.00	17.56
Lima (spot)		Sp. Quintal			
Tanguis, Type 5	7-27	101.4 lbs.	Sol	106.00	16.08
Recife (spot)		Arroba			
Mata, Type 5	7-27	33.07 lbs.	Cruzeiro	80.00	13.17
Sertao, Type 5	7-27	33.07 lbs.	Cruzeiro	85.00	13.99
Sao Paulo (spot)		Arroba			
Sao Paulo, Type 5	7-27	33.07 lbs.	Cruzeiro	89.00	14.65
Torreón (spot)		Sp. Quintal			
Middling, 15/16"	7-28	101.4 lbs.	Peso	88.25	17.91

Compiled from weekly cables from representatives abroad.

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LIVESTOCK AND ANIMAL PRODUCTSSWISS LIVESTOCK CENSUS REVEALS FEWER
CATTLE AND SHEEP, MORE HOGS AND HORSES

According to the April 1945 census of livestock in Switzerland, as compared with last year, cattle numbers show a further decline of 2 percent to 1,461,000 head and sheep show a decrease of 8 percent to 192,400. The 698,000 hogs represented a 16 percent increase over last year, but the number is still 30 percent smaller than 1939, and the 149,000 horses indicated an increase of 1 percent over 1944. Other significant changes in livestock numbers follow:

Cattle: The present cattle population is 15 percent smaller than the record level of 1939. There was also a further decrease of 2 percent in the number of cows to 805,000 head, the smallest number reported since the early 1920's, while the number of calves reserved for rearing fell to 163,820 head--an all-time low point, which appears to indicate fewer milk cows in 1947.

Hogs: Sows increased 12 percent above last year to reach 61,963. Hog numbers have been greatly reduced since April, however, by the slaughter of many small pigs due to lack of feed.

Sheep: Numbers of sheep are still about 4 percent larger than that of 1939, but are smaller than for the past 4 years, when an upward trend was indicated.

Horses: An urgent need for draft animals for farm work has resulted in an increase of 1 percent above 1944 in horse numbers, with the increase taking place largely in foals which will not be ready for farm work for some time. The number of mares increased only 550 and there were 2,360 fewer draft horses.

COLOMBIA PLANS IMPROVED
CATTLE MARKETING FACILITIES

Colombia is taking steps to provide improved marketing facilities that would include erection of a slaughter house in a location accessible to cattle raisers on the eastern grasslands and to markets in Bogota and also purchase of motorized transportation. This will cut down the losses sustained when cattle are driven long distances on the hoof over rough terrain from the eastern producing areas of Colombia to markets in Bogota. In about 2 months, a plan is expected to be completed for the founding of a company to construct a modern slaughter house at Villavicencio, a town on the western edge of this cattle raising area, over the mountain range from Bogota, and to purchase refrigerated trucks that are expected to reduce the time consumed in transport of meat over the high mountains to Bogota from 8 days to 4 hours.

At the same time, cattle raisers in the llanos are of the opinion that further steps will be necessary before meat prices in Bogota can be reduced materially. The most important of these are: A Government sponsored program to build better roads in the llanos and the establishment of transportation facilities for cattle on large rivers, such as the Ubia, Casanare, Cravo, and Cusiana. The Government is operating a boat at present on the Meta River, which is said to have eliminated 60 days of travel overland at a saving of 10 pesos a head and 6 months of feeding the cattle to regain the weight lost when moving the cattle on the hoof across the llanos and over the high mountain ranges. (Ten pesos-\$5.70.)

An agreement has been made between the Colombia Office of Price Control and the cattle raisers who sell in the Bogota market that the price per 100 pounds for 1st, 2nd and 3rd class cattle would be approximately as follows in dollars: \$9.57; \$9.05 and \$6.98. These prices are stated to be satisfactory to cattle men and are the prices which the Bogota slaughter house is now paying, according to weekly reports received in the Office of Price Control.